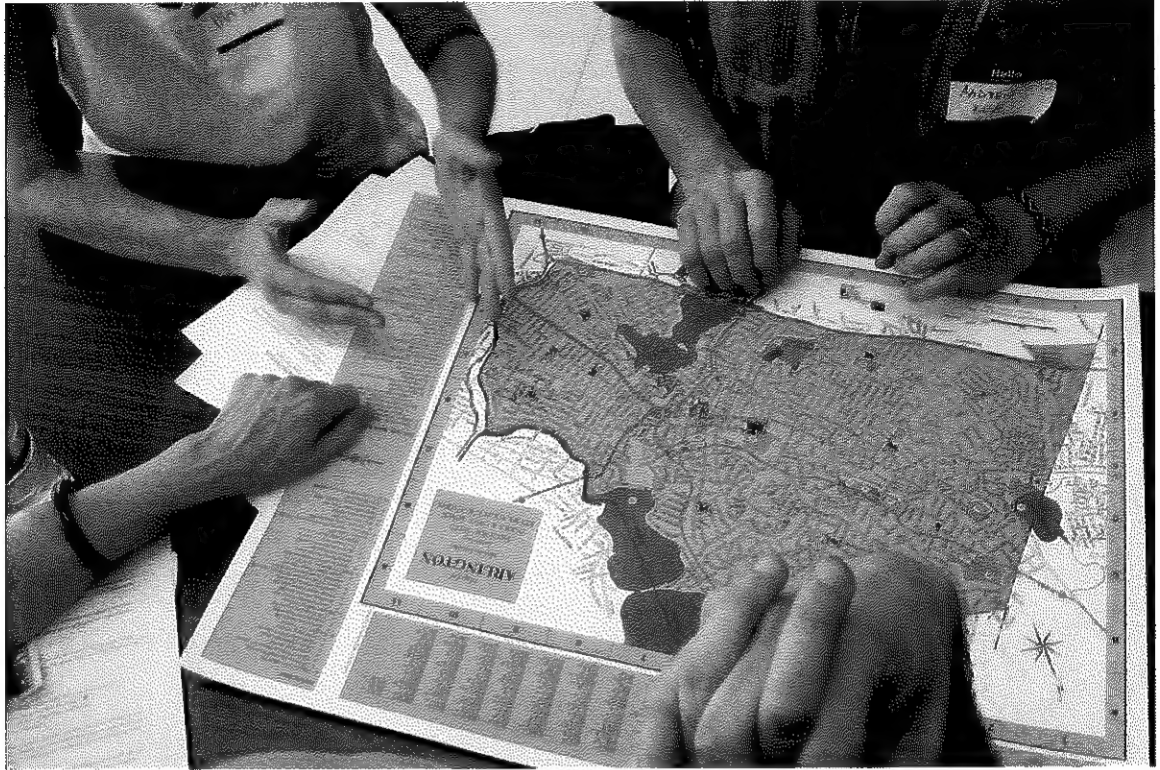


Town of Arlington Housing Production Plan Update



Non-Price Proposal

Submitted To:
Town Manager's/Purchasing Office
Town Hall Annex, 2nd Floor
730 Massachusetts Avenue
Arlington, MA 02476

By:





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OVERVIEW

Barrett Planning Group LLC is pleased to submit this proposal to assist the Town of Arlington with a Housing Production Plan Update. For this engagement, we have assembled an experienced team with an established track record as partners in planning and community development: Barrett Planning Group and Horsley Witten Group. Given the scope of work outlined in the Town's Request for Proposals (RFP), we believe our team is ideally qualified to serve you. We offer many competitive strengths:

- Recognized expertise in housing needs analysis, strategic planning, and real estate economics for affordable and market-rate housing;
- Thoughtful, talented community engagement team with a multidisciplinary perspective;
- Extensive experience both regionally and nationally in inclusionary zoning and analysis of regulatory barriers to affordable housing development;
- Over three decades of experience in local government planning and policy analysis;
- High comfort level working with professional staff, boards and commissions, the general public, and developers;
- Extraordinary depth of knowledge and work experience in Boston Metro Area cities and towns; and
- A talented team of planners with top-notch skills in demographic studies and spatial analysis with GIS technology.

BARRETT PLANNING GROUP LLC

Barrett Planning Group is a planning and community development firm specializing in comprehensive planning, zoning, affordable and fair housing policy, and development impact analysis. We are a certified woman-owned business by the State Office of Supplier Diversity. The firm is led by **Judi Barrett**, planning and community development professional with 33 years of experience in state and local government and the private sector, mainly in New England. Judi will serve as principal-in-charge. She has managed numerous municipal master plan engagements and prepared neighborhood revitalization plans, zoning ordinances and bylaws, and housing plans. Judi is known nationally for her work in inclusionary zoning. She is highly respected for her work in socioeconomic impact analysis as well. As a consultant for almost 20 years with the Massachusetts Housing Partnership (MHP) Chapter 40B Technical Assistance Program, Judi has worked with Boards of Appeal throughout the state. She is the principal author of MHP's *Chapter 40B Handbook for Zoning Boards of Appeal* (2017).

Judi previously served as Director of Municipal Services for RKG Associates, Inc.; Planning Director at Community Opportunities Group, Inc.; CDBG Program Director at the Massachusetts Department of Housing and Community Development (DHCD); and Community Development Director for the



Town of Plymouth, MA. A frequent panelist at APA and other professional conferences, Judi also serves as a trainer for the Massachusetts Citizen Planner Training Collaborative (CPTC) and other organizations. She chairs the Housing and Community Development Committee of the American Planning Association's Massachusetts Chapter and serves on the Housing and Economic Development Product Council of the Urban Land Institute, New England.

Alexis Lanzillotta, Project Manager, will coordinate the consulting team's work in Arlington. Alexis has led community engagement projects for Barrett Planning Group in Brewster, Quincy, and Bridgewater, and is currently co-leading our engagement work for Pioneer Valley Planning Commission (PVPC) on two master plans in Western Massachusetts. When the Citizen Planner Training Collaborative (CPTC) engaged us in March 2019 to update and revise all thirteen core courses offered by CPTC each year, Alexis served as principal researcher, author, and curriculum designer, and coordinated our work with the client. Alexis is also the firm's team leader for graphic communications, using Adobe Illustrator and other tools to provide polished graphics for community events, public meetings and hearings, and final reports. Alexis earned her undergraduate degree at Tufts University and a Master of Education from Fitchburg State University.

Other Barrett Planning Group staff will participate in this project as well, as indicated in our plan of services.

HORSLEY WITTEN GROUP

Horsley Witten (HW) Group is a small, full-service planning, design, and engineering firm based in Sandwich, Massachusetts, with satellite offices in Boston, Providence, and Exeter, NH. The firm was incorporated in 1988 and consists of a professional staff of over 50 land use planners, engineers, scientists, graphics designers, and landscape architects. **Nathan Kelly**, AICP, Principal, and **Jeff Davis**, AICP, Project Manager will represent Horsley Witten Group for the Arlington Housing Production Plan.

Nate Kelly has 20 years of professional experience and is well known throughout New England as an expert in sustainability, natural resource protection, and planning and zoning. As one of the main authors of the Massachusetts Smart Growth/Smart Energy Toolkit, Nate has led planning and zoning engagements for more than 50 New England cities and towns. He provides training and technical assistance to municipal planners in a wide range of interest areas, e.g., regulating design, parking strategies, food systems planning, zoning for renewable energy, and effective community engagement. Nate is certified in the National Charrette Institute (NCI) Charrette System™ and Charrette Management and Facilitation™ Certificate Training. Nate Kelly has extensive experience with affordable housing site analysis and feasibility studies, public meeting facilitation, and strategy implementation for housing and community development.

Jeff Davis, AICP is a professional planner of over 13 years, first in the greater Washington, DC area, and then in New England for the past seven years. He joined Horsley Witten as Principal Planner in



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December 2015. Prior to that, he served as a Principal Planner for Land Use at the Rhode Island Statewide Planning Program from February 2012 and at Rhode Island Housing from February 2010. He has worked on a variety of planning and community development projects, and is currently working on planning and zoning projects for public-sector clients. His experience underscores the interrelation of land use, housing, economic development, and social issues in the creation of community assessments, neighborhood plans, comprehensive/master plans and other local, regional and statewide community planning efforts. Much of Jeff's work requires meaningful public input and community engagement. He has a long track record of assisting communities and organizations to develop and implement community engagement strategies that strengthen plans.

Barrett Planning Group and Horsley Witten Group have worked together on master plans for Hingham, Easton, and Shrewsbury, MA, and a housing plan for Hanson, MA.



APPROACH AND PLAN OF SERVICES

Our work plan is based on the tasks outlined below. Nevertheless, if selected for this engagement, we would be pleased to negotiate work plan adjustments at the Town's request. A chart outlining the following tasks and identifying the primary team member(s) responsible for each task can be found at the end of this section.

MOBILIZATION

Our team will participate in a kickoff meeting with Town staff and, if as appropriate, members of the Housing Plan Implementation Committee, the newly-formed Arlington Affordable Housing Trust, Arlington Redevelopment Board (ARB), or other Town boards or commissions that may be assembled to serve as an advisory committee. The kickoff meeting will provide an opportunity to make any necessary adjustments in the plan of services, finalize the public participation plan, and determine the best approaches to civic engagement in Arlington, and obtain data or documentation that is not readily available on the Town's website. As part of the mobilization process, we will conduct a tour of Arlington, either self-directed or with Town staff depending on the Town's preference and COVID gathering protocols in place at the time of the tour.

HOUSING NEEDS ASSESSMENT

To provide useful policy and programmatic recommendations, it is essential to understand the local and regional context for affordable housing in Arlington. The approach outlined below will promote that understanding, make good use of existing plans, studies, and databases owned by the Town, the regional planning agency, and complete a thorough Housing Needs Assessment as described in the Town's RFP.

- **Existing Plans.** We will review Arlington's 2015 Master Plan, 2016 Housing Production Plan (further discussed below), and other local plans and pertinent information from outside sources, and identify data needs to be addressed during development of the Housing Production Plan. Our team will verify the adequacy of available data for understanding and documenting historic trends and future projections, e.g., building permits and demolition permits, assessor's parcel data employment, business establishments, incomes, affordability, and other key variables from existing secondary sources.
- **Detailed Analysis of 2016 Housing Production Plan.** Arlington states in the RFP that meaningful progress has not been made to address the housing production goals laid out in its 2016 Housing Production Plan. As such, the Town would like to see an assessment of why implementation of the existing five-year plan was not achieved so that the new plan's goals can be approached through this lens of reflection. Through our research for this updated plan, in particular the individual and small-group interview process described below, we will analyze the existing plan's findings, goals, and implementation plan to determine what hindered its execution. Sometimes Housing Production Plans fall short of expectations because a community did not have the staff capacity or political wherewithal to reach legitimate, ostensibly achievable goals; sometimes the



implementation plan itself, however noble, overestimated what the city or town could do. In addition, having inadequate financial resources often explains why a plan or strategy fell short, so there needs to be either a commitment of new resources or a better alignment of the goals and action plan with the reality of a community's financial and political means.

In Arlington's case, there is also the enormous challenge of being (or being perceived as) a substantially built-out suburb, which means that however small, every change in the Town's built environment has many onlookers within the neighborhood and likely, many critics. Moreover, Arlington lies within the immediate orbit of the Cambridge housing market. The relentless pressure for a single-family home in this Greater Boston sub-market has accelerated price growth far ahead of what many expected even as recently as five years ago. The fact that Arlington has evolved as a single-family suburb complicates the housing conversation, too, and at least historically, there has been an uneven distribution of housing choices and some degree of class tension between East Arlington, Arlington Center and Arlington Heights. All of these and other factors make addressing local and regional housing needs challenging for policy makers, advocates, and investors..

- **Individual and Small-Group Interviews.** A housing needs assessment relies on access to good data, but there is no substitute for the information gathered through interviews with people who know the community and its housing problems. We will conduct a series of individual and small-group interviews on two or three days (depending on how they are scheduled) with a variety of people whose knowledge will be invaluable for updating Arlington's housing needs assessment. Examples of people to be interviewed include housing developers and property managers, residents of affordable housing and mixed-income developments, and representatives of the Arlington Housing Authority, Housing Corporation of Arlington, the Housing Plan Implementation Committee, Arlington Human Rights Commission, Arlington Public Schools, local/area banks (first-time homebuyer mortgage lenders and banks providing multifamily loans), Arlington Chamber of Commerce, social service organizations, faith-based community leaders, organizations serving low-income and minority clientele, and others. The initial interview process would be an ideal time for us to meet representatives of Arlington's neighborhood group, as well.
- **First Community Meeting.** In addition to providing the public with a general overview of the process for developing a Housing Production Plan, this first community meeting will invite participants to provide input about Arlington's housing needs, barriers to meeting these needs, the previous plan's goals, and more. Large-scale public engagement efforts early in the process can help to build the plan's credibility and broaden the conversation about housing needs across income levels, household types, and neighborhoods. It also offers a way to think about the Town's housing "report card," and engage residents in critical thinking about what people value in Arlington and whether the community's values are changing.
- **Local Housing Conditions and Market Assessment.** Our team will prepare an inventory of existing demographic, economic, and housing conditions and housing market trends, using



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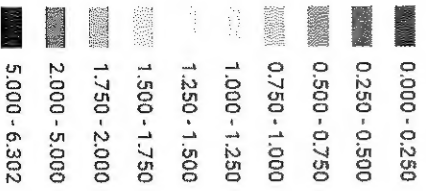
available data from the Planning and Community Development Department (e.g., pipeline projects and recent approvals), the Town Assessor, Arlington GIS, and proprietary (subscription) sources such as CoStar, Reonomy, and Rentometer. Findings from 2021 Metro Mayor's Coalition Regional Housing Taskforce and the Metropolitan Area Planning Council's (MAPC) MetroCommon 2050 will be analyzed and incorporated as they become available to ensure alignment with these regional efforts. Additionally, we also will look to well-tested sources such as the American Community Survey (ACS), unique data sets in Social Explorer, ESRI Business Analyst, HUD CHAS Data, and others for social, demographic, and economic data sets that can help to inform our interpretation of market activity. Arlington's involvement in the North Suburban HOME Consortium likely means that a fairly recent housing market assessment has been conducted. Relevant demographic, housing, and market trends will be reviewed, spatially analyzed, and mapped. A supply and demand analysis and gap analysis will be prepared. Arlington and other Greater Boston towns benefit from having access to many data sources that are not as well maintained or even available in other parts of the Commonwealth. In addition, Arlington's involvement in the North Suburban HOME Consortium likely means that a fairly recent housing market assessment has been conducted.

The following pages include sample maps that provide insight into some notable trends relating to Arlington's housing stock – namely, the low building value as compared to land value for many residential properties (which speaks to the high land value in Arlington), and the age of the Town's housing stock.

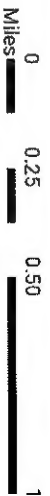


TOWN OF ARLINGTON

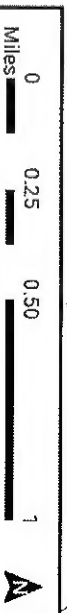
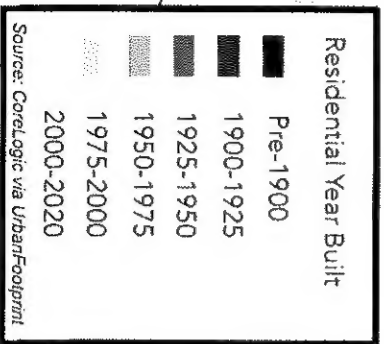
Residential Building to
Land Value Ratio



Source: CoreLogic via UrbanFootprint



TOWN OF ARLINGTON

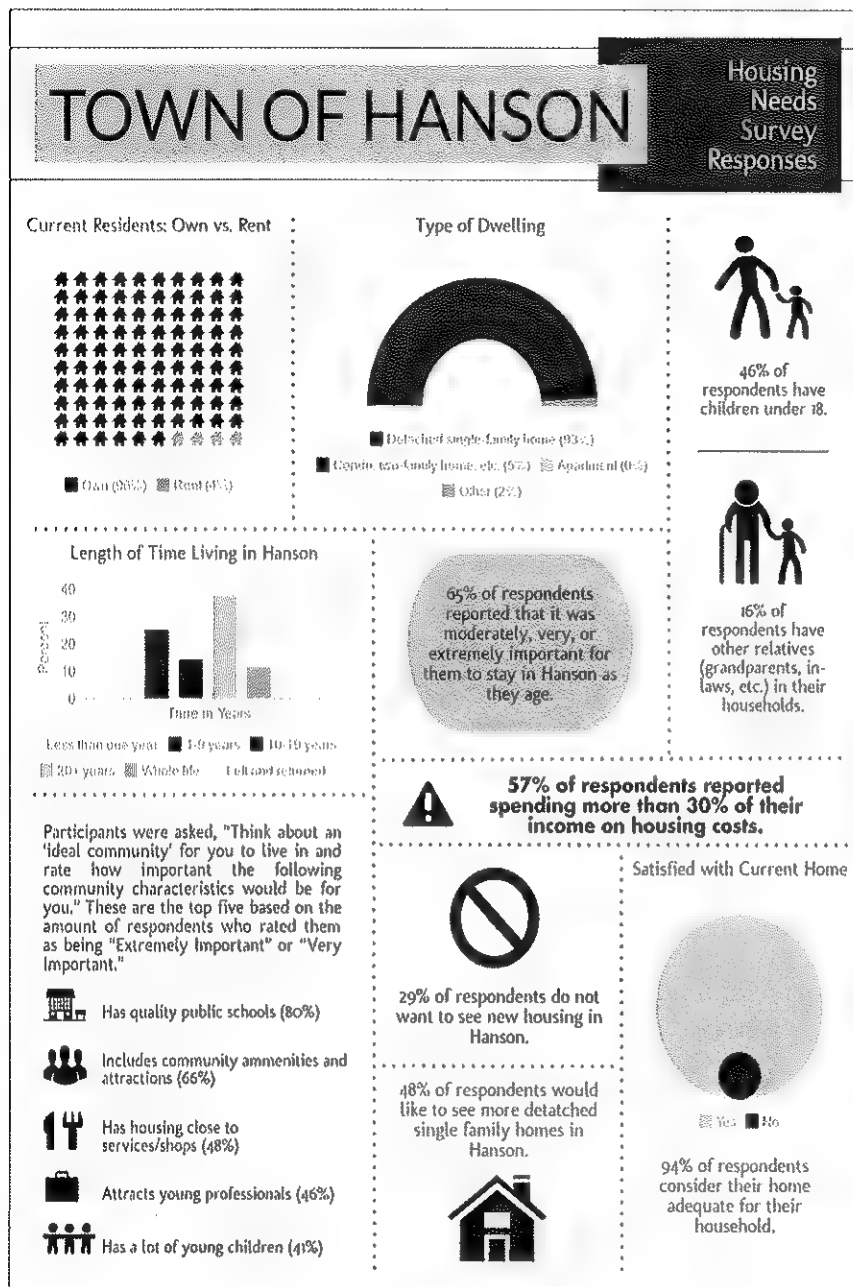


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- **Affordable Housing Barriers and Opportunities.** No housing needs assessment is complete without an assessment of local capacity and barriers to affordable housing development. As stated in the RFP, we understand that Arlington's barriers today are largely the same as those identified in the 2016 plan, so we will focus on opportunities to address these existing and known impediments with updated actions, as well as identifying new or evolving barriers. To do so, we will review Arlington's land use regulations and permitting procedures, transportation, infrastructure, and public services for their potential impact on present and future housing development, and specifically on the creation and preservation of affordable housing. In addition, we will review, analyze, and describe existing housing development capacity in Arlington, considering local and regional organizations, both public and private, access to funding, and so forth.
- **Fair Housing Assessment.** Depending on its level completion at the time of our needs analysis, we will review and incorporate the findings from the Town's (in-progress) Fair Housing Plan. Working as closely as possible within the framework of HUD's Affirmatively Furthering Fair Housing planning process, we will supplement these findings through an evaluation of available data and information gathered for the previous tasks to assess fair housing barriers in Arlington. The goal will be to identify housing policies and practices that disproportionately affect groups protected by the federal Fair Housing Act and state law. Arlington's current work with Metropolitan Area Planning Council will prove helpful for this task, and we look forward to reviewing this Fair Housing Plan when it is made available.
- **Issues Analysis.** Our team will identify and document key issues and findings from the research and analysis tasks performed above and generate a discussion document and maps for review and comment by the Town. The issues analysis will focus on not only statistical indicators of housing need, but also regulatory, physical, infrastructure, and capacity impediments that should be accounted for in developing housing plan strategies and recommendations. Each required component in DHCD's Housing Production Plan guidelines will be addressed, including recommended goals and action items.
- **Second Community Meeting.** Following Town review of the issues analysis, we will host a second community meeting to present our findings to the public and solicit feedback. In our experience, providing residents with the chance to see the results of the input they provided through the public engagement process reassures them that their voices are heard and fosters a sense of community responsibility for the plan. It also builds into the planning process a way for us to verify that we *did* hear what the community told us, and a platform for providing some public information and education about the role housing plays in perpetuating health, income, and other inequities on the basis of race, class, immigration, family status, disability, and other factors.



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Infographic from a Housing Production Plan our firm completed in 2019 for Hanson, MA. This visualization provided a snapshot of results from an online survey we conducted as part of our Needs Assessment.

HOUSING GOALS

Following local review of the Housing Needs Assessment, our team will assist the Town in developing goals for the Housing Production Plan. "Goals" are numeric on one hand – such as number of units – and *qualitative* on the other hand, e.g., types of housing the Town needs, social equity considerations, underserved settings with critical housing needs, and housing choices. These goals will flow into the action and implementation plan and will be shaped from the needs analysis. Some, perhaps many, of the new plan's goals may reinforce, follow, or build upon the goals of the 2016 Plan.



IMPLEMENTATION STRATEGIES (ACTION PLAN)

- **Area and Site Suitability Criteria.** We will work with Town staff and boards to determine criteria that can be used to identify and evaluate areas and potential sites for affordable or mixed-income housing, or housing in mixed-use developments. For site identification decisions, we always encourage local officials to identify properties or areas they consider appropriate and let the consultants conduct a technical, place-based review of those sites. This approach has always worked well, in our experience, largely because it respects the knowledge that already exists in local government and reinforces that the community owns the plan. It creates an early opportunity in designing the action plan for the Town to assert its preferences and have meaningful authorship of the plan's content.
- **Recommendations.** Our team will identify opportunities for regulatory reform and other mechanisms to bridge the gap between existing conditions and Arlington's affordable housing needs. These recommendations will address Town-wide housing needs across income levels and should include, at a minimum:
 - Land development regulations, in particular exploring zoning incentives that will enable the successful execution of current planning efforts such as Connect Arlington;
 - Financial mechanisms to support the development of affordable housing;
 - Employer and institutional involvement;
 - Potential use of Chapter 40B, Chapter 40R, and other measures;
 - Staffing needs for carrying out affordable housing initiatives;
 - Potential for partnerships or regional collaborations, especially any identified through the MMC Regional Housing Taskforce and MAPC's MetroCommon 2050; and
 - A review of "best practices" from other communities in New England and beyond, considering communities with similar demographics and location characteristics.
- **Implementation Schedule.** Barrett Planning will propose a five-year action plan schedule to guide the Town's implementation of strategies outlined in the plan. This schedule will outline specific milestones and timeframes, developed in careful consideration with Town staff and the advisory committee.
- **Presentations (Including Third Community Meeting).** Our team will present a final public presentation of key findings, goals, and strategies at a public meeting sponsored by the Arlington Redevelopment Board or other entity as determined by the Town and present the final Housing Production Plan at a public meeting of the Board of Selectmen. Ideally, the Select Board and Arlington Redevelopment Board should conduct a joint hearing to consider the proposed Housing Production Plan, as both boards are required to approve the plan and submit it to DHCD for review.



COMMUNITY ENGAGEMENT ASSUMPTIONS

Barrett Planning Group assumes the following meeting commitments and project coordination responsibilities in order to complete this project:

- Kickoff meeting with the Planning and Community Department and to discuss the project approach and timetable, refine the scope of work, and develop the engagement plan (see “Mobilization,” above). If the advisory committee has already been selected by the Town, its members should be involved, as well; if not, this meeting can allow the Town and consultants to discuss the makeup and role of the advisory committee.
- Individual and small-group interviews with people knowledgeable about the Town’s housing conditions and needs, as described above. Examples of the types of interviewees we typically meet with include residents of public housing and privately owned and managed affordable housing (residents of affordable and market-rate units), housing developers (for-profit and non-profit); representatives of social service organizations and faith-based communities; bank representatives, mainly focusing on mortgage loan and multifamily loan products; Town staff and representatives of key Town boards; representatives of existing neighborhood associations; and local businesses, the Arlington Chamber of Commerce, and so forth.
- A public engagement strategy to obtain input from residents as the planning process unfolds. The strategy should at minimum include a community survey (online), but depending on Arlington’s experience with public participation and the evolving constraints of COVID (see virtual engagement discussion below), techniques such as a pop-up participation event downtown or at the neighborhood level could be considered if and when it is safe to do so. We have had excellent results using “low-tech” participation methods like placing a large comment board in public places where residents can write down their ideas in response to a question prompt on the board. An audience-specific meeting could be considered, too, e.g., an engagement event at the senior center. In some cities and towns, close collaboration with faith-based communities has helped to involve groups that are often under-represented in community planning activities. These and other ideas should be discussed, and decisions should be made about them, at the kickoff meeting so we can prepare a public participation plan to guide the entire housing planning process.
- Three meetings with advisory committee and Planning and Community Department, in addition to the kickoff meeting and scheduled prior to each public meeting:
 - To discuss public engagement process and prepare first public meeting
 - To review Needs Assessment findings
 - To review proposed Goals and Actions
- Three public meetings:
 - To educate the public about this process and solicit their feedback
 - To present findings from Needs Assessment and solicit input



- To present overview of draft final plan
- Reasonable daytime project coordination sessions with the Planning and Community Development Department.

We understand that these assumptions may need to be adjusted following discussions at the kickoff meeting. We recommend including opportunities for civic engagement during the early phases of the project so the public will know this project is underway and that residents will have a chance to participate well before the plan is substantially developed.

Thoughts on Virtual Engagement

Our firm has Zoom, Zoom Webinar, and Webex licenses and we have used all of them for community participation work. We bring considerable expertise and a high comfort level with virtual engagement, and although it presents access and equity concerns that we are keenly aware of, we also see that it has enabled participation by many people who did not engage in face-to-face planning events because of work and family conflicts. Our success with online participation had a great deal to do with why the Pioneer Valley Planning Commission recently hired us to lead the engagement process for two of their community master plans, as did the Town of Chatham for an upcoming community conversation process about affordable housing development on town-owned land.

To reduce the discomfort that some people feel with Zoom and other virtual participation platforms, we design meetings to be interesting and unthreatening to participants, using tools we can integrate or pair with Zoom such as Padlet and Quizizz in addition to the Zoom whiteboard and conventional techniques such as the Zoom chat feature. We always spend a few minutes orienting participants at the start of each meeting, and one staff member is always on our meeting team for tech support. In addition, we maintain a subscription with Otter.ai for real-time streaming of meeting notes so that people with hearing impairments can participate. In general, we much prefer to conduct virtual meetings as Zoom meetings, not Zoom Webinar, because the former is a much better option for promoting a sense of community within these events. We are flexible, however, and will work with the Town to design the best possible remote participation experience.

DELIVERABLES

We will provide two copies of all reports as well as Microsoft Word and PDF digital copies. This includes interim reports (Housing Needs, Goals, and Strategies) as well as the Final Housing Production Plan. Additionally, we will provide digital copies of PowerPoint presentations for each public meeting, and GIS map packages for maps prepared in support of the plan.



TOWN ASSISTANCE

We anticipate needing the following data, information, and assistance from Town staff:

- GIS data: the Town's assessor's parcel map and assessor's database; roads; infrastructure (water/sewer, if available); zoning map; historic districts map (if applicable); open space datalayer; most recent orthophotos.
- The most recent update of the Zoning Bylaw (Word or PDF).
- Lists (print or electronic) of recent site plan, special permit, and subdivision submissions to the Town, by year for the past five years (since the last HPP was written), with information about number of approved dwelling units, if available (ideally in Excel or another editable format).
- A few sample decisions of the Arlington Redevelopment Board and Zoning Board of Appeals for site plan and special permit approvals (Word or PDF).
- List of residential building permits over the past five years (ideally in Excel or another editable format).
- Assistance with scheduling interviews. We will provide an online sign-up system and will ask Town staff to distribute a link to it by email.
- Assistance with outreach for public meetings. We will provide all required outreach materials for the Town's use. We ask that the Town help to disseminate these materials to the community.



PROJECT SCHEDULE

The chart below lists the seven core tasks for this project and approximate time required for each major phase of the project. (Time is expressed in number of weeks from Notice to Proceed.)

		Within 4 Weeks	Within 8 Weeks	Within 12 Weeks	Within 16 Weeks	Within 20 Weeks	Within 26 weeks	Within 30 Weeks
Mobilization	Kickoff Meeting	XXXX	XXXX					
	Town Tour	XXXX	XXXX					
Needs Assessment	Interviews/ Focus Groups		XXXX					
	First Community Meeting		XXXX					
	Completion of Needs Assessment				XXXX			
	Second Community Meeting					XXXX		
Goals, Strategies, Implementation	Draft Goals					XXX		
	Draft Strategies and Implementation Plan					XXXX		
Final Steps	Draft HPP						XXXX	
	Third Community Meeting						XXXX	
	Presentation to Select Board							XXXX
	Final Plan							XXXX



RELEVANT EXPERIENCE

The following is a representative list of recently completed Housing Production Plans and similar housing planning and policy work by Barrett Planning Group principals and staff.

- Housing Production Plan, Town of Dennis; completed 2021
- Housing Production Plan, Town of Wellesley; completed 2018
- Housing Production Plan, Town of Brewster; completed 2017
- Housing Production Plan, Town of Lenox; completed 2017
- Housing Production Plan, Town of Brookline; completed 2016
- Housing Production Plan, Town of Nantucket; completed 2016
- Governor Prentice Inn Reuse Assessment, Town of Orleans; completed 2021
- Millstone Road Community Engagement Process, Town of Brewster; completed 2020
- Central Florida Regional Housing Coalition, consultant and guest speaker, "Zoning for Affordable Housing," 2017-2018
- Chapter 40B Handbook for Zoning Boards of Appeal (prepared for Massachusetts Housing Partnership); completed 2017
- Nantucket Affordable Housing Trust Strategic Plan; completed 2018
- Nantucket Workforce Housing Needs Assessment, Housing Nantucket, Inc.; completed 2015
- Newton Housing Strategy, City of Newton; completed 2015
- Falmouth Housing Needs Study and Demand Analysis; completed 2014 (APA-MA Project Planning Award)
- Housing Production Plan, Town of Groton; completed 2014
- Amherst Housing Market Study; Inclusionary Zoning Review and Tax Incentive Subsidy Strategy; Town of Amherst, 2015



REFERENCES

BARRETT PLANNING GROUP (LEAD CONSULTANT)

Wellesley Housing Production Plan (2018)

Meghan Jop, Executive Director of General Government Services

Email: mjop@wellesleyma.gov

Phone: 781-431-1019, x2201

Email: mjop@wellesleyma.gov

Brookline Housing Production Plan (2016)

Alison Steinfeld, Director

Joseph Viola, Assistant Director

Brookline Planning Department

Phone: (617) 730-2130

Email: asteinfeld@brooklinema.gov or jviola@brooklinema.gov

Nantucket Housing Production Plan (2017)

Andrew Vorce, AICP

Director of Planning and Land Use Services

Phone: (508) 325-7587

Email: avorce@nantucket-ma.gov

Hingham Master Plan (2021)

Gordon Carr, Chair

Hingham Master Plan Committee

Phone: (617) 835-5835

gordoncarr@gmail.com

HORSLEY WITTEN GROUP

Shrewsbury Master Plan

Kristen Las, AICP

Assistant Town Manager/ED Coordinator

Town of Shrewsbury, MA

(508) 841-8508

klas@shrewsburyma.org

Horsley Witten Group led the Shrewsbury Master Plan process, with Barrett Planning Group as a subcontractor. Horsley Witten Group subsequently led the Shrewsbury Town Center Study and assisted with the Beal School Sale RFP Development.



Proposal for Housing Production Plan: Town of Arlington

Norton Town Center Study and Bylaw Revisions

Paul DiGiuseppe, CNU-A, MPA

Director of Planning & Economic Development

Town of Norton, MA

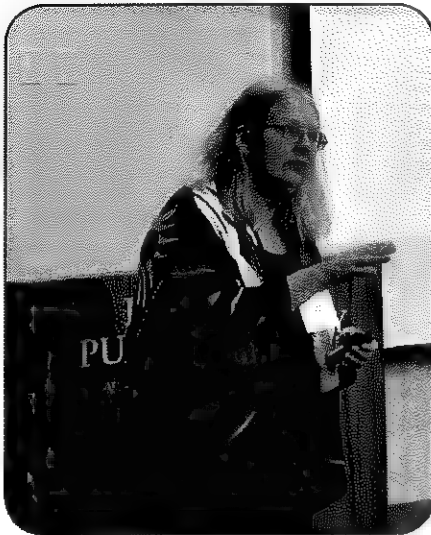
Phone: (508) 285-0279

pdigiuseppe@nortonmaus.com



RESUMES AND PROPOSAL CERTIFICATIONS





PROFESSIONAL SERVICES

Community Planning
Neighborhood Development
Zoning & Regulatory Reform
Housing Policy & Planning
Fiscal & Economic Impact
Technical Assistance



FIRM PROFILE

Barrett Planning Group LLC provides high-quality, customized planning and community development services for cities and towns and non-profit organizations. Founded by Judi Barrett, a veteran planner with over 33 years of experience in the field, Barrett Planning Group is known for our creative approach to planning and problem-solving, our expertise as trainers and technical assistance providers, our attentiveness to clients, and our expertise in capacity building. We help municipal leaders strategize and become persuasive advocates for the people who live and work in their communities and the small businesses that fuel the local economy. We offer fresh ideas worth listening to and advocate for public policies inspired by a commitment to basic social fairness.

WHAT WE DO

- Community-wide and neighborhood-level planning
- Training, technical assistance, and capacity building
- Public education
- Community engagement
- Ordinances and bylaws
- Housing policy analysis and planning
- Market analysis
- Socioeconomic impact analysis
- GIS mapping and spatial analysis

OUR MISSION

Barrett Planning Group meets the planning and capacity building needs of local governments and their private-sector partners. We deliver customized, place-based products and services of lasting value, and we collaborate with other firms that share our commitment to quality and innovation. In all our work, Barrett Planning Group advocates for healthy, sustainable, and culturally and educationally rich communities.

Barrett Planning Group LLC is a certified women business enterprise (WBE) by the Massachusetts State Office of Supplier Diversity.



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 judi@barrettplanningllc.com
 781.934.0073 Ext. 7

BACKGROUND

Judi Barrett is the founding principal and managing director of Barrett Planning Group LLC. She brings 33 years of planning and community development experience as a consultant and community and economic development professional with state and local government. Judi has devoted her career to building the capacity of cities and towns to solve difficult public policy questions and to develop effective leadership and advocacy skills. She has prepared and managed a variety of projects for public and private clients, including comprehensive and strategic plans, zoning revisions, housing studies, and more. She is well known for her work in affordable and fair housing policy and inclusionary zoning. A frequent panelist at regional and national conferences and a guest lecturer for planning programs, Judi is also a technical assistance resource and trainer for city and town officials and non-profit boards.



PROFESSIONAL EXPERIENCE

Professional Affiliations & Service

- American Planning Association
- APA-Massachusetts Chapter, Chair, Housing and Community Development Committee
- Urban Land Institute, Boston/New England Chapter, Member, Housing and Economic Development Product Council
- Trainer, APA-MA AICP Exam Preparation Course: Economic Development and Public Participation Modules
- Trainer, Citizen Planner Training Collaborative (CPTC)
- Trainer, Neighborhood Revitalization Strategy Areas (NRSA) and Neighborhood Planning Strategies for HUD CDBG Grantees
- Guest Lecturer, Graduate Planning Courses, University of Massachusetts, Massachusetts Institute of Technology, Harvard Graduate School of Design

Owner and Managing Director, Barrett Planning Group LLC, April 2017-Present. Founder of small private consulting firm providing strategic planning, training, and technical assistance services to municipalities from Maine to Florida. Judi Barrett has prepared numerous comprehensive plans, affordable housing and fair housing studies and plans, neighborhood revitalization and commercial center vision plans, and zoning ordinances and bylaws over her 33-year career. She is highly respected for her work in socioeconomic and fiscal impact analysis.

Director of Municipal Services, RKG Associates, Inc., May 2013-April 2017. Played an instrumental role in expanding RKG's practice in Massachusetts as part of a longer-term company plan to consolidate and reorganize its New England economic development operation. Responsible for marketing, business development, project management, client relations, and supervising teams of RKG staff and subcontractors. Projects ranged from comprehensive plans to major zoning revisions, housing market studies, economic development plans and policy studies, conflict resolution, and training and technical assistance contracts.

PROFESSIONAL EXPERIENCE

Director of Planning, Community Opportunities Group, Inc., March 1996-April 2013. Established and built a well-respected municipal planning practice for a small Boston-based firm that specializes in community development and housing. Planning group offered services in city and town planning, open space and recreation plans, housing and economic development plans, zoning, fiscal impact analysis, technical assistance, and capacity building. Also provided expert witness services for Chapter 40B comprehensive permit appeals. Won three planning awards from the Mass. Chapter of the American Planning Association.

Director, Community Development Fund, Executive Office of Community Development, June 1993-March 1996. Managed the Community Development Fund (CDF), the Commonwealth's largest set-aside of Community Development Block Grant (CDBG) funds for non-entitlement cities and towns. Directed annual application round, prepared application package and technical assistance materials, oversaw the review and awards process, and supervised grant compliance and grantee monitoring. Reported to Deputy Secretary of Community Development.

Community Development Administrator, Town of Plymouth. September 1988-June 1993. Responsible for developing a comprehensive community development department offering housing, economic development, park and open space, and other programs and services with CDBG and other funds. Oversaw the formation of Plymouth's "Main Street" program (Downtown/Waterfront), wrote the special legislation that created the Tourism Fund and Visitor Services Board, and provided staff support and technical assistance to numerous boards and commissions. Assisted with preparing master plans for the Downtown/Waterfront Area, North Plymouth, and Manomet.

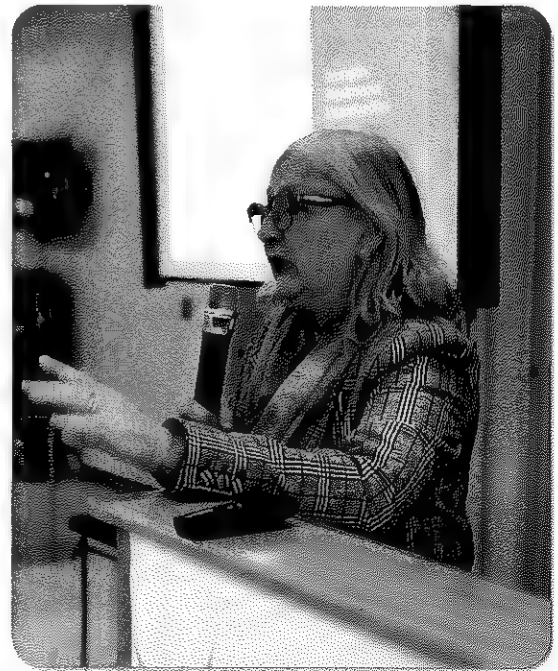
EDUCATION

Harvard University, Bachelor of Liberal Arts (cum laude).
Concentrations: American Civilization and Government.

Graduate coursework in **American Studies, University of Massachusetts Boston; and Economics and Community Development, Harvard University and Tufts University.**

Recent Conference Presentations

- APA National Planning Conference, 2015, 2016, 2017, 2018
- Central Florida Regional Affordable Housing Coalition, 2018 Housing Summit, "Regulatory Strategies to Create Affordable Housing"
- ULI Housing Conference: Housing Opportunity, 2016, Boston, Massachusetts. "Affordability in the Suburbs: From Fair Housing to Community Opposition"
- APA Northeast Region Conference, 2015, Saratoga Springs, NY. "Getting Ahead of Demographic Trends"
- Southern New England APA Conference, 2011-2017, 2019
- Massachusetts Housing Institute, 2014, 2015, 2018
- Cape Cod Housing Institute, 2017, 2018, 2019, 2020



Judi Barrett
Owner & Managing Director
Barrett Planning Group

REPRESENTATIVE LIST OF CURRENT AND PAST ENGAGEMENTS

Zoning & Regulatory Barriers Assessment

Southbridge Comprehensive Zoning
Revision

Bedford Great Road Zoning Revision

Tewksbury Comprehensive Zoning Revision

Beverly Inclusionary Zoning Bylaw

Salisbury Inclusionary Zoning Bylaw

Lenox Comprehensive Zoning Revision

Comprehensive Zoning Update for
Downtown Needham

Comprehensive Planning

Hingham Master Plan

Littleton Master Plan

Tewksbury Master Plan

Westford Comprehensive Plan

Dedham Master Plan

Lincoln Comprehensive Plan

Medfield Master Plan

Fair Housing & Equity Assessments

WestMetro HOME Consortium (Newton)

City of New Bedford

City of Worcester

Citizen Planner Training Collaborative

Socioeconomic Impact Analysis

National Development, Waterstone & Bridges at Lexington

Westwood Planning Board, University Station

Westford Multifamily Impact Analysis

Dedham Planning Board, Legacy Place

Jeffrey Donohoe Associates, Impact of Relocating Military
Personnel from Island of Guam

North Andover Community Development Department,
Osgood Landing Chapter 40R District

Technical Assistance & Strategic Planning

Citizen Planner Training Collaborative (CPTC) Comprehensive
Curriculum Revision & Update

GrowSmart RI/Land Use Training Collaborative Strategic Plan

City of Chelsea Strategic Plan for Affordable Housing

Departmental Reorganization Study, Town of Medway





ALEXIS LANZILLOTTA

Project Manager

Barrett Planning Group LLC

PO Box 6338

Plymouth, MA 02362

alexis@barrettplanningllc.com

781.934.0073 Ext. 2

BACKGROUND

Alexis Lanzillotta joined Barrett Planning Group in 2018 after enjoying a twelve-year career as a public school teacher. She brings many of the skills cultivated in the classroom to her role as a project manager for Barrett Planning Group, particularly in creating educational materials for clients and designing community engagement opportunities that promote participation, collaboration, and enthusiasm among attendees. Alexis has designed sophisticated workbook tools for the firm that can efficiently organize and analyze data from public sources and select proprietary services. She is also the firm's team leader for graphic communications, using tools like Adobe Illustrator to provide polished graphics for community engagement events, public meetings and hearings, and final reports.

PROFESSIONAL EXPERIENCE

Project Manager, Barrett Planning Group: 2018-Present. Responsible for demographic, economic, and fiscal impact research and analysis for our municipal and private non-profit clients. Coordinates the work of subcontractors on major project teams. Responsible for report writing and editing assignments, developing materials for public meetings and co-facilitating public workshops. Expertise in Adobe graphics applications and infographics design.

Latin Teacher, Duxbury Public Schools: 2006-2018. Taught introduction to the Latin language and an overview of Roman culture to grades 7-8. Collaborated with colleagues to restructure the Duxbury Latin curriculum based on ACTFL standards.

Latin Tutor, Academic Resource Center, Tufts University: 2004-2005.
Independent Tutor: 2006-2012.

EDUCATION

M.Ed. in Curriculum and Teaching, Fitchburg State University, 2010.

B.A. in Latin (cum laude), Tufts University, 2006.

Also successfully completed graduate-level coursework at the **University of Massachusetts Boston**, 2013-2019, in the history of Latin literature and methodologies for teaching Latin.



Professional Affiliations

- American Planning Association Member
- Massachusetts Association of Planning Directors Member

Special Interests

- Graphic design
- Geographical analysis
- Visioning and consensus building processes

Current & Recent Projects

- East Milton Square Visioning Process
- Bridgewater Comprehensive Master Plan
- Brewster Millstone Road Visioning Process
- Hingham Master Plan
- Citizen Planner Training Collaborative (CPTC) Curriculum Update

Barrett Planning Group meets the planning and capacity building needs of local governments and their private-sector partners. We deliver customized, place-based products and services of lasting value, and we collaborate with other firms that share our commitment to quality and innovation. In all our work, Barrett Planning Group advocates for healthy, sustainable, and culturally and educationally rich communities.



TYLER MAREN

Community Planner

Barrett Planning Group LLC

PO Box 6338

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tyler@barrettplanningllc.com

781.934.0073 Ext. 4

BACKGROUND

Community Planner Tyler Maren comes to Barrett Planning Group as a recent graduate of Clark University's renowned graduate program in Community Development & Planning. Tyler specialized in studying housing issues, which fostered a strong interest in urban planning, human geography, social justice, and public service. Tyler believes that planning is important to ensuring that our communities evolve and grow in an equitable, healthy, and sustainable way. His areas of experience include working with municipalities on planning and zoning issues, affordable housing, community engagement and research, and GIS mapping.

PROFESSIONAL EXPERIENCE

Community Planner, Barrett Planning Group LLC, September 2020-Present. Provides general project support, zoning review, and advanced statistical analysis. Responsible for writing and editing reports for our municipal clients.

Planning & Zoning Assistant, Town of Westford, MA, September 2017-September 2020 (Intermittent). Assisted the Planning and Zoning departments with document preparation, GIS tasks, site visits, and meeting minutes. Gained wide-ranging experience in government administration, local housing and economic development issues, and community engagement.

Research Assistant, A Case Study in Rural Southwestern Uganda, Colgate University, May 2012. Conducted academic research with a team of 14 students and professors on location in Southwestern Uganda. Led field studies in villages near the Bwindi Impenetrable National Park. Gained practical experience in GIS as well as qualitative and quantitative data collection.

EDUCATION

Clark University, Master of Arts in Community Development & Planning, 2020. Concentration in Urban Resilience. Published research paper on housing issues for refugee populations in Worcester, MA. Treasurer, IDCE Graduate Student Association, 2019.

B.A. in Geography (magna cum laude), University of Massachusetts Amherst, 2016. Charter member, UMass Amherst Chapter: Gamma Theta Upsilon (international geography honor society). President, UMass Amherst Geography Club, 2016.



Professional Affiliations

- American Planning Association Member
- Massachusetts Association of Planning Directors Member

Special Interests

- Equitable housing issues
- Human geography
- GIS and geographical analysis

Current & Recent Projects

- Boxborough Planning Board Zoning Audit
- Lancaster Planning Board Inclusionary Zoning Feasibility Study
- Bridgewater Comprehensive Master Plan
- Dennis Housing Production Plan

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CATHERINE DENNISON

Community Planning Associate

Barrett Planning Group LLC

PO Box 6338

Plymouth, MA 02362

catherine@barrettplanningllc.com

781.934.0073 Ext. 5

BACKGROUND

Catherine Dennison joined Barrett Planning Group in 2020 as a Community Planning Associate. Catherine is a recent graduate of Wellesley College, where as a Davis Scholar, she studied American Studies and Economics with a concentration on Race, Gender, and Class in the United States in the Twentieth Century. Her research in Indigenous women's representation earned her recognition as a Knapp Fellow in the Social Sciences. As a leader and advocate in the Davis Scholar community, Catherine facilitated creative and cooperative problem-solving efforts to address unmet needs. Catherine's range of experience from retail management to research equips her for her role at Barrett Planning Group, where she enjoys varied responsibilities that challenge her and help her to exercise and develop her skills.



PROFESSIONAL EXPERIENCE

Community Planning Associate, Barrett Planning Group LLC, September 2020-Present. Provides research support, including data and resource compilation, organization, and analysis. Conducts interviews and surveys to support community engagement and data collection. Assists in drafting, editing, and preparing reports and professional development materials. Responsible for advanced document layout finalization in Adobe InDesign.

Store Manager, DAVIDsTEA at Derby Street, December 2016-July 2018. Operated one of the highest volume and most profitable DAVIDsTEA locations in New England. Ensured the team's consistent delivery of outstanding customer experiences and developed strategies for reaching and surpassing retail sales targets while controlling costs. Responsible for recruiting and training staff, overseeing day-to-day store operations, and creating and fostering relationships with local businesses through outreach and community events.

EDUCATION

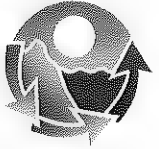
B.A. in American Studies, Wellesley College, 2020. Minor in Economics. Concentration on Race, Gender, and Class in the United States in the Twentieth Century. Davis Scholar, 2018-2020. Davis Scholar Class Council Treasurer, 2018-2019. Knapp Fellow in the Social Sciences, 2020.

Special Interests

- Data visualization and presentation
- Social and economic history

Current & Recent Projects

- Citizen Planner Training Collaborative (CPTC) Curriculum Update
- Hingham Master Plan
- Nantucket Housing Production Plan
- Site Future Use Study for the Town of Orleans
- City of Quincy Language and Disability Communications Access Needs Assessment
- Technical Assistance, Milton Zoning Board of Appeals



Nathan Kelly AICP, NCI

Principal Planner
nkelly@horsleywitten.com
401-272-1717

Areas of Expertise

Comprehensive Planning
Regulatory Reform
Village and Downtown Planning
Low Impact Development
Watershed Planning & Assessment

Professional Registrations & Affiliations

AICP
National Charrette Institute (NCI)
Charrette System™ Training Certification
APA, CT Chapter
APA, MA Chapter
APA, RI Chapter
Dragonfly Society of the Americas

Academic Background

Masters of Arts,
Urban and Environmental Policy and
Planning, Tufts University
Graduate courses in Applied Watershed
Management, Negotiation and Conflict
Resolution, Land Use Management,
Urban Planning, and Environmental Law
Bachelor of Arts, Philosophy and English,
Boston College

Professional Experience

Horsley Witten Group, Inc.,
Principal Planner, 2000 to present

Nathan Kelly is a Principal with HW and directs the firm's Providence, Rhode Island office. Nate has over 20 years of project management experience, and has provided professional planning, zoning, and facilitation services to more than 50 New England municipalities. Nate served as President of the Rhode Island Chapter of the American Planning Association from 2017-18 and serves on Grow Smart Rhode Island's Land Use Training Collaborative. He regularly provides training services for the Cape Housing Initiative and the Mass Housing Partnership and received the Friends of the Network award from Rhode Island's Housing Network in 2020. Nate earned his master's degree in Urban and Environmental Policy from Tufts University and currently resides in Providence, RI.

KEY PROJECTS

Community Master Plans: Managed the development of Community Master Plans for over a dozen municipalities across New England. Communities include, but are not limited to: Canton, Easton, Shrewsbury, and Sudbury, MA; Burrillville, Narragansett, and South Kingstown, RI; Exeter and Stratham, NH; and Haddam, CT.

Comprehensive Zoning Reform: Led the development and adoption of comprehensive zoning and subdivision reform in Attleboro, Athol, Braintree, and Walpole, MA; Groton and Waterford, CT; and Jamestown and North Kingstown, RI.

Village/Downtown Planning: Served as the project lead for over a dozen village/downtown planning and zoning projects. Each project assessed the unique opportunities and challenges related to housing, economic development, infrastructure, zoning, and environmental issues. Projects include Norton, Shrewsbury, Stoughton, and Yarmouth, MA; North Kingstown, South Kingstown, and Pawtucket, RI; Groton, CT; and Exeter, NH.

Open Space and Recreation: Served as project manager or principal-in-charge for over a dozen open space and recreation plans/needs assessments for Massachusetts communities including, but not limited to Billerica, Bourne, Scituate, and Yarmouth.

"House Doctor" Services for MassDevelopment: Provides on-call planning and zoning services for communities funded through various MassDevelopment programs. Recent efforts include the Town Center Study for Shrewsbury, MA and the Gateway Rezoning for the Town of Grafton, MA. Shrewsbury's project also included support services for developing an RFP to sell a school to a private developer.

Exeter Housing Future: As part of Master Plan implementation, led a public outreach process to assess the potential for three different neighborhoods to accommodate higher volumes of more diverse housing. Ultimately drafted new zoning tailored to each area, which was unanimously adopted. The project won "Plan of the Year" in 2020 from the local APA Chapter.

Conant Thread District: Provided planning and zoning services to the cities of Pawtucket and Central Falls, RI for the establish of an inter-city Transit Oriented Development district. The project included new zoning provisions and design standards for both cities and a complete set of procedures and regulations for the state's first inter-city Joint Planning Commission.

Nathan Kelly, AICP, NCI

Principal Planner

nkelly@horsleywitten.com

Horsley Witten Group
Sustainable Environmental Solutions



Middletown on the Move, City of Middletown, CT: Worked with the City to identify brownfield properties that may be appropriate for reuse as active recreation space. Organized public engagement activities for the project, including community interviews, site tours, open houses, public forums, online surveys, and a project website and social media.

Smith Island Vision Plan, MD: Supported the Consensus Building Institute (CBI) in developing a Vision Plan for the island residents in the wake of Hurricane Sandy. Facilitated the process, and developed the final document.

Quonset Development Corporation Permitting and Development Standards: Unified the separate Town Zoning Districts on QDC land into a single Quonset Zone and Developing complementary enforcement mechanisms between the Town and QDC Quonset Development Corporation Permitting and Development Standards. Updated all of QDC's performance standards for building design, site design, and utilities.

40R District Implementation, Brockton, MA: Lead planning consultant for the establishment of the Thatcher Street Smart Growth Overlay District in service to the Archdiocese Planning Office of Urban Affairs (POUA). The district includes the conversion of an existing convent to affordable housing and infill of new units on the convent grounds. Nathan developed all application materials including the new Zoning Ordinance provisions.

Rooftop Solar Bylaw & Policy Guidance: Worked with the Massachusetts Executive Office of Energy and Environmental Affairs (EEA) to develop a model local bylaw and accompanying guidance document for use by Massachusetts municipalities to regulate the development of small-scale solar energy systems.

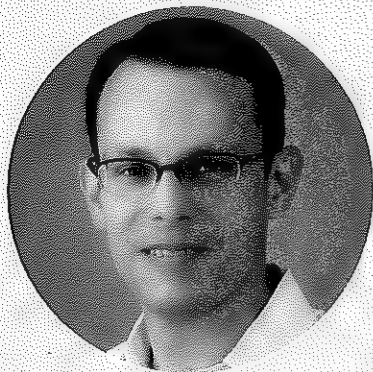
Commonwealth of Massachusetts Smart Growth/ Smart Energy Toolkit: The Executive Office of Energy and Environmental Affairs developed a Smart Growth/Smart Energy Toolkit as an interactive CD-ROM training manual. Served as one of the lead planning consultants for this effort and authored the material for many of the Smart Growth techniques that were examined in detail.

Rhode Island Community LID Site Planning and Design Guidance: Served as the project manager for the development of a local guidance manual that will serve as a companion to the upcoming revision to the Rhode Island state stormwater standards. The manual will provide a variety of techniques that can be used at the local level to promote better site design and compact development.

Inclusionary Zoning Guidance, Department of Administration, State of Rhode Island: Developed definitive guidance manual for municipalities to effectively implement inclusionary zoning. The manual focused on suburban and rural communities that would expect incremental development through small subdivisions.

Salmon River Watershed (SRW) Regulatory Recommendations, CT: Partnered with The Nature Conservancy (TNC) and leaders from nine communities in the SRW of central Connecticut. Facilitated meetings with Town officials and staff, and conducted assessments of Zoning Regulations, Subdivision Regulations, and Inland Wetlands and Waterways Regulations. Drafted and presented regulatory recommendations applicable to each community within the SRW.

Strategies to Protect Farms and Forests, Rhode Island Department of Environmental Management (RIDEM) and Rhode Island Agricultural Partnership: Worked with municipal officials from across the state, the project developed guidance for towns to identify business uses or commercial operations that will help maintain the viability of farms, provide incentives to limit the loss of working farm and forest lands, and adopt performance standards for these farm-based business activities.



Horsley Witten Group

Sustainable Environmental Solutions



Jeff C. Davis, AICP

Senior Planner

jdavis@horsleywitten.com
401-272-1717

Areas of Expertise

Land Use & Comprehensive Planning
Neighborhood Planning
Housing
Community Engagement
Project Management
Community & Economic Development
Website Development & Maintenance

Professional Registrations & Affiliations

Certified Municipal Vulnerability
Preparedness Provider
American Institute of Certified Planners
(AICP)
National Charrette Institute (NCI)
Charrette System™ and Charrette
Management and Facilitation™
Training Certification
APA - National, RI Chapter,
LGBTQ & Planning Division

Academic Background

Master of Community Planning,
University of Maryland
Bachelor of Arts, International Studies,
Whitworth University

Professional Experience

Horsley Witten Group, Inc.,
Senior Planner, 2018 to Present
Project Planner, 2015 to 2018
RI Division of Planning, Principal Planner,
2012 to 2015
RI Housing, Technical Assistance
Coordinator, 2010 to 2012
DC Office of Planning, Consultant,
2009 to 2010
DC Office of Planning, Neighborhood
Planner, 2006 to 2008
Montgomery Housing Partnership,
Community Development Specialist,
2003 to 2006

Jeff Davis is a professional planner of over 17 years, first in the greater Washington, DC area, and then in New England for the past ten years. He has worked on a variety of planning, zoning, and community development projects. His experience underscores the interrelation of land use, housing, economic development, and social issues in the creation of community assessments and surveys, neighborhood plans, comprehensive/master plans and other local, regional and statewide community planning efforts. Much of Jeff's work requires meaningful public input and community engagement, including conducting and analyzing the results of surveys and interviews.

KEY PROJECTS - PLANNING

Comprehensive Plan, City of Chicopee, MA: Working with the city to develop its first-ever comprehensive plan with a strong emphasis on community engagement beyond the "usual suspects." Coordinating with city staff and a diverse steering committee to incorporate non-traditional topics such as food access, public health, and energy.

Master Plan, Town of Hingham, MA: Working as a subconsultant with a team of planning firms to update this plan, with an emphasis on issues related to sustainability, water, energy, and land use.

Comprehensive Plan, Town of Burrillville, RI: Worked with the town to complete a full update to its comprehensive plan, including new sections on Energy and Natural Hazards & Climate Trends. Staffed planning board meetings and ensured that all content, maps, and data conform with standards of the State of Rhode Island.

Comprehensive Plan, Town of South Kingstown, RI: Worked with the town to complete a strategic update to its comprehensive plan, focusing on Housing, Energy, and Natural Hazards & Climate Change. Staffed public meetings and workshops with the Town's Planning Board and conducted interviews and focus groups. Ensured that all content, maps, and data conform with standards of the State of Rhode Island.

Plan of Conservation and Development, Town of Haddam, CT: Worked with this town straddling the Connecticut River to complete a full update to its Plan of Conservation and Development (POCD), including all community engagement.

Sustainable Jamestown, Town of Jamestown, RI: Worked with this island community on an action plan to maintain its quality of life into the future, including issues such as water conservation, energy conservation, resiliency to climate change, diverse housing, a healthy economy, and the ability for people born in the community to choose to stay there as adults.

Housing Strategies, Town of South Kingstown, RI and Town of Smithfield, RI: Working with South Kingstown to complete a strategic study of its housing needs, including alternatives to standard single-family homes and where they can best be accommodated. This project will result in regulatory changes that will accommodate and promote more housing alternatives and affordable housing. Working with Smithfield to update the Housing chapter of its Comprehensive Plan, with an emphasis on its affordable housing strategy.

Middletown on the Move, City of Middletown, CT: Worked with the City to identify brownfield properties that may be appropriate for reuse as active recreation space. Also worked with community members to identify other opportunities for active living.

Jeff C. Davis, AICP
Senior Planner
jdavis@horsleywitten.com

Horsley Witten Group
Sustainable Environmental Solutions



KEY PROJECTS - ZONING

Jamestown Zoning Update, Town of Jamestown, RI: Assisting the Town in a targeted rewrite of its Zoning Ordinance, with an emphasis on village zoning, environmental concerns, housing alternatives, signs, parking, and use regulations. Making presentations before the planning commission and working with staff to develop public communication materials to share changes with the public.

Mystic Education Center Zoning, Town of Groton, CT: Assisting the Town in drafting new zoning for mixed-use redevelopment of a former school and recreation campus.

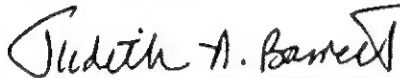
Downtown Stoughton Zoning Overlay, Town of Stoughton, MA: Assisting the Town in a targeted rewrite of its downtown overlay district, with an analysis of existing uses, desired uses, effectiveness of existing zoning, and recommendations for edits that will make it easier and more desirable for developers to create a more vibrant, walkable town center.

Warwick Zoning Update, Town of Warwick, RI and Burrillville Zoning Update, Town of Burrillville, RI: Assisting these Towns in updates to a targeted set of issues in their Zoning Ordinances, with an emphasis on renewable energy production (wind and solar), rural land uses, short term rentals, accessory dwelling units, digital signs, and more.

Groton Zoning Update, Town of Groton, CT and Braintree Zoning Update, Town of Braintree, MA: Assisted both Towns in a rewrite of their Zoning Regulations/Ordinance, to make them clearer, more user-friendly, more concise, and more effective at producing the type of development desired by the towns. These complete overhauls included changes to zoning districts, dimensional standards, the use table, definitions, use conditions, and more, as well as extensive communications with staff, commissioners, and the public about what has changed and why.

**CERTIFICATE OF NON-COLLUSION FORM
TOWN OF ARLINGTON
HOUSING PRODUCTION PLAN UPDATE**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.



Signature of Individual Submitting Bid or Proposal

Judith A. Barrett

Name of Individual Submitting Bid or Proposal

Barrett Planning Group LLC

Name of Business

February 3, 2021

Date

BY STATE LAW THIS NON-COLLUSION FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

**CERTIFICATE OF TAX COMPLIANCE FORM
TOWN OF ARLINGTON
HOUSING PRODUCTION PLAN UPDATE**

Pursuant to MGL Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

82-1066293

Social Security Number or
Federal Identification Number

Judith A. Barnes

Owner and Managing Director

Signature and Title of Individual or
Responsible Corporate Officer

BY STATE LAW THIS CERTIFICATE OF TAX COMPLIANCE FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.



BARRPLA-01

CLEDDUKE

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/25/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER RogersGray, Inc. 434 Rte 134 South Dennis, MA 02660	CONTACT NAME:	PHONE (A/C, No, Ext): (800) 553-1801	FAX (A/C, No): (877) 816-2156
	E-MAIL ADDRESS: mail@rogersgray.com		
INSURED Barrett Planning Group, LLC 6 Resnik Rd. Ste 201 Plymouth, MA 02360	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: Hanover Insurance Company (The)		22292
	INSURER B: Allmerica Financial Benefit Insurance Company		41840
	INSURER C:		
	INSURER D:		
	INSURER E:		
		INSURER F:	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJ-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:		OHND308469	7/10/2020	7/10/2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/POP AGG \$ 2,000,000
A	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		OHND308469	7/10/2020	7/10/2021	COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ 1,000,000 PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 0		OHND308469	7/10/2020	7/10/2021	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input checked="" type="checkbox"/> Y/N <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below	N/A	W2ND805523	1/15/2021	1/15/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 500,000 E.L. DISEASE - EA EMPLOYEE \$ 500,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
A	Errors & Omissions		LHN D308590-03	7/10/2020	7/10/2021	Per Occurrence 1,000,000
A	Commercial Property		OHND308469	7/10/2020	7/10/2021	Bus. Pers. Property 13,500

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Consultant - zoning and community development planning

Certificate Holder is listed as Additional Insured with respects to General Liability when required by Written Contract

CERTIFICATE HOLDER

CANCELLATION

Evidence of Insurance	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 